The Role of Seafood Advisory Programs in Influencing the Seafood Consumers

Dave L. Anderson

Special thanks to **James Anderson** and **Cathy Roheim** from the University of Rhode Island's department of Natural Resource Economics

AQUARIUM OF THE PACIFIC®

A non-profit institution

"If you are doing everything right but not getting the desired outcome: you're not doing everything right"

Inputs and Outputs

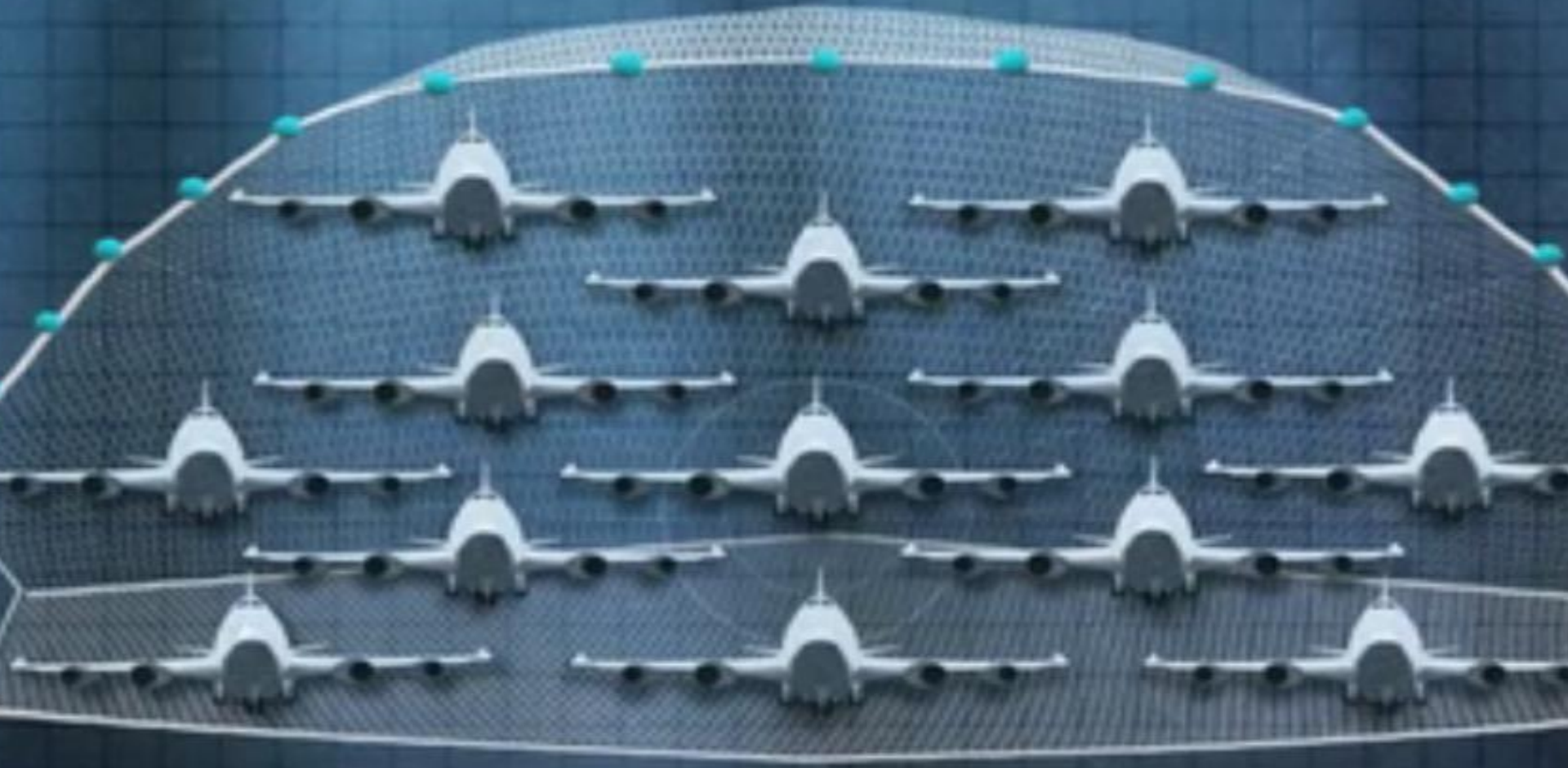
- What are the environmental and economic objectives?
- Are we doing the right things in order to get there?
- How do we know what's working?

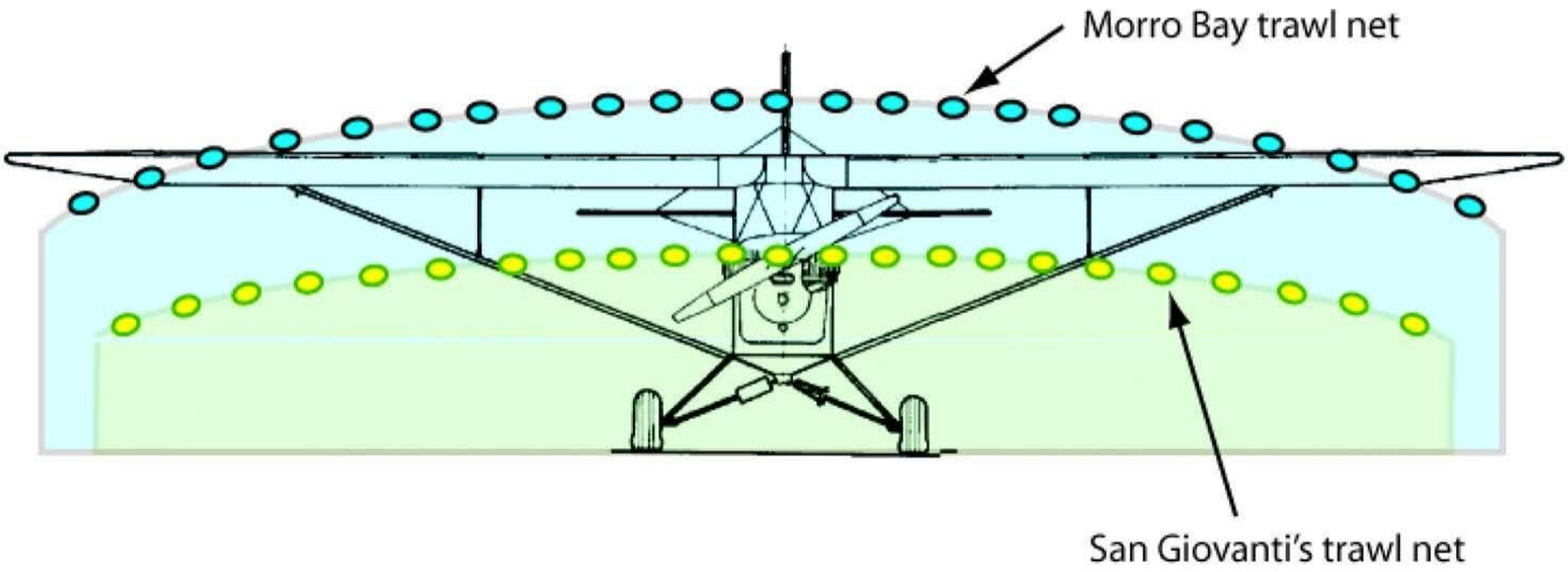
1. Boycotts
2. Wallet cards
3. Eco-labels

Outputs?

"At a particular equilibrium price, if the proportion of consumer demand for the environmentally-friendly good is smaller than the proportion of supply of that good, then Ecolabeling may lead to increased prices for unlabeled goods, and hence increased output of products produced by methods detrimental to the environment."

Wessells CR. 2001. Product certification and ecolabelling for fisheries sustainability. Food & Agriculture Org. Fisheries Technical Paper 422.




Morro Bay trawl net
San Giovanti's trawl net

Inputs

Desired Outcomes

1. Protect ecosystem

1. Advance and promote well-managed fisheries

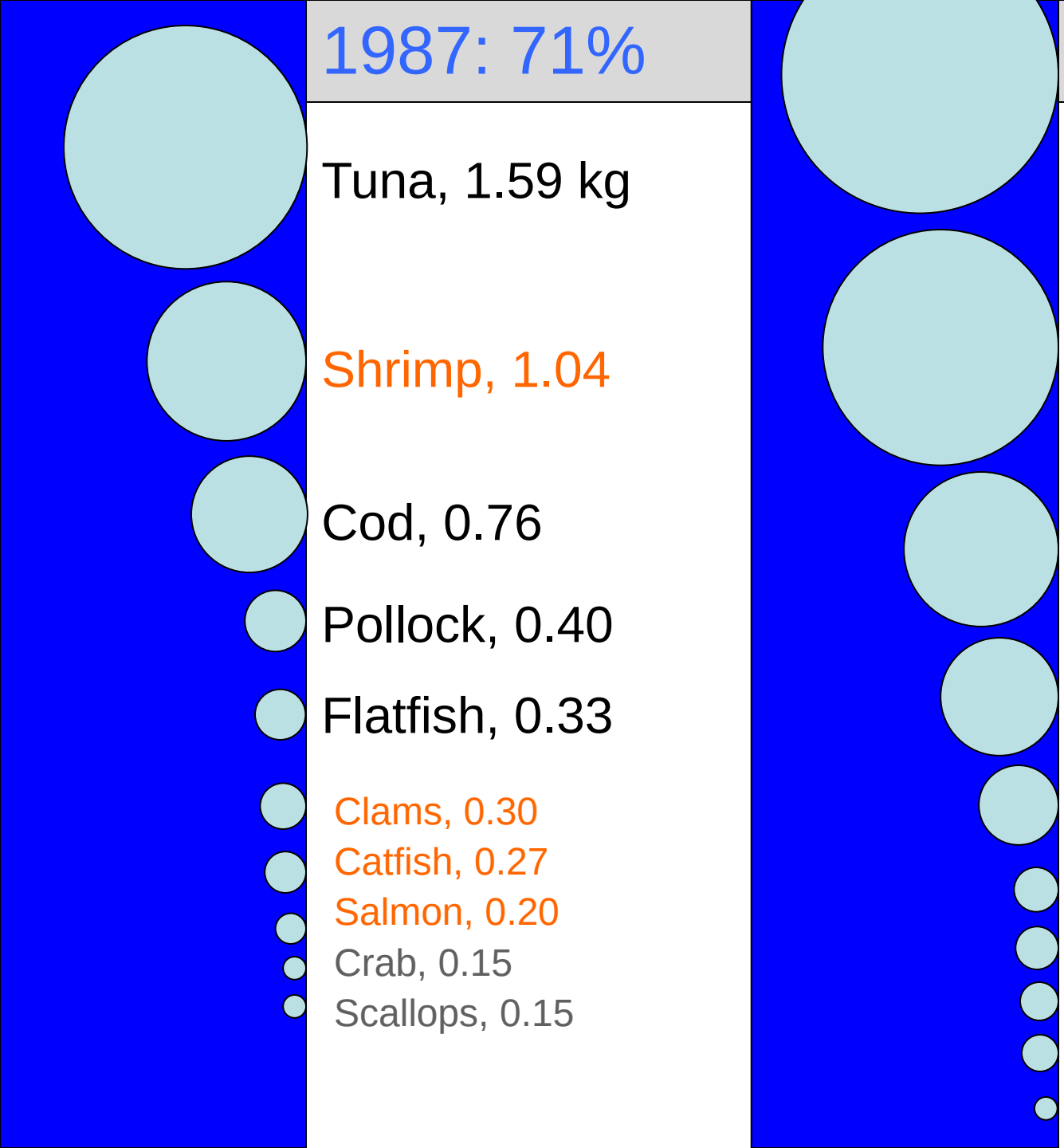
2. Support the US domestic industry

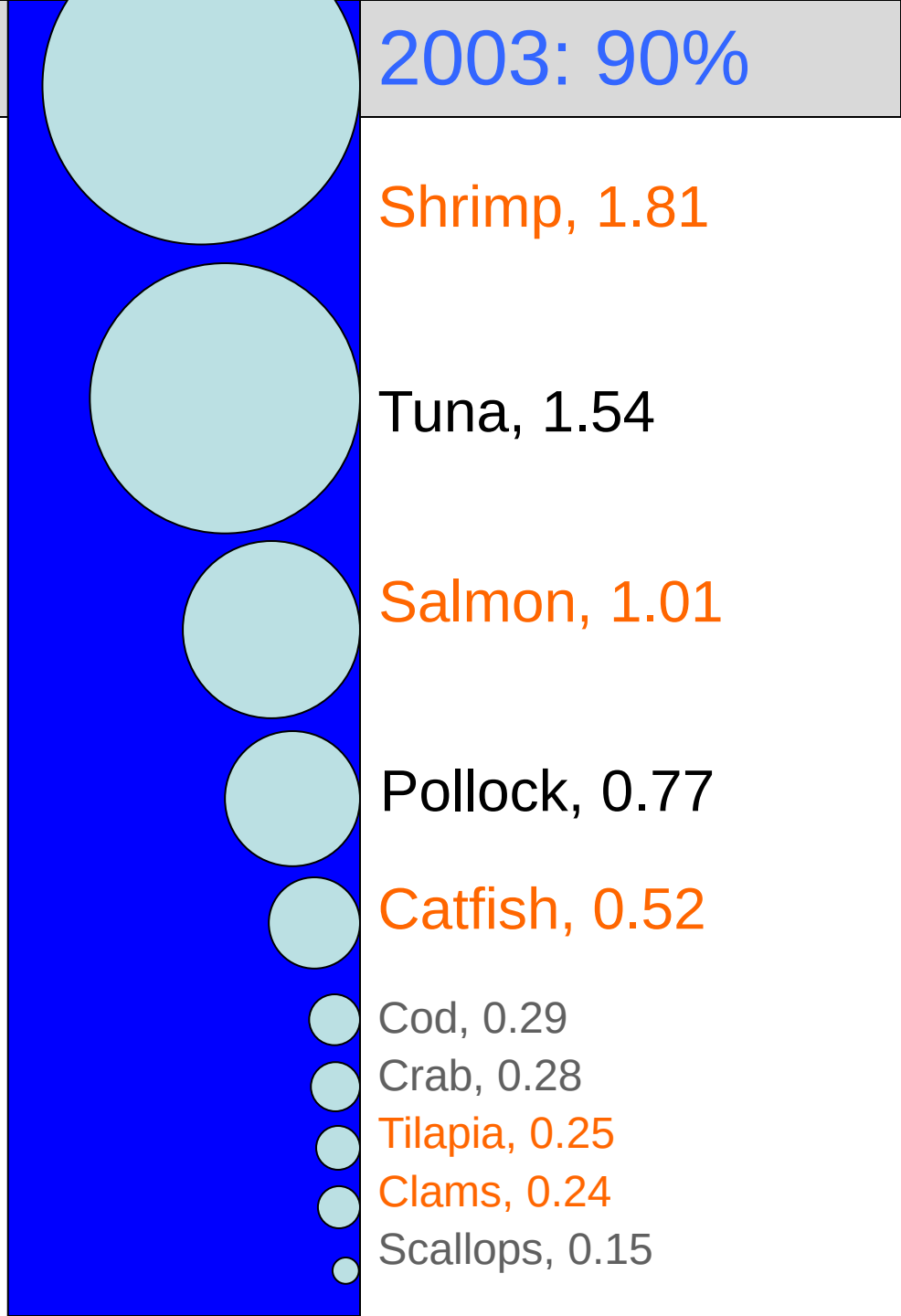
3. Supply seafood to consumers

Omega-3 fatty acids: effective in the 2° treatment of six out of seven of the leading causes of death in the US.

Center for Disease Control

1. **Heart Disease**
2. **Cancer**
3. **Stroke**
4. **Lower Respiratory Disease**
5. Accidental Death
6. **Diabetes**
7. **Alzheimer's**


1987: 71%
Tuna, 1.59 kg
Shrimp, 1.04
Cod, 0.76
Pollock, 0.40
Flatfish, 0.33
Clams, 0.30
Catfish, 0.27
Salmon, 0.20
Crab, 0.15
Scallops, 0.15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Shrimp, 1.81
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Pollock, 0.77
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Tilapia, 0.25
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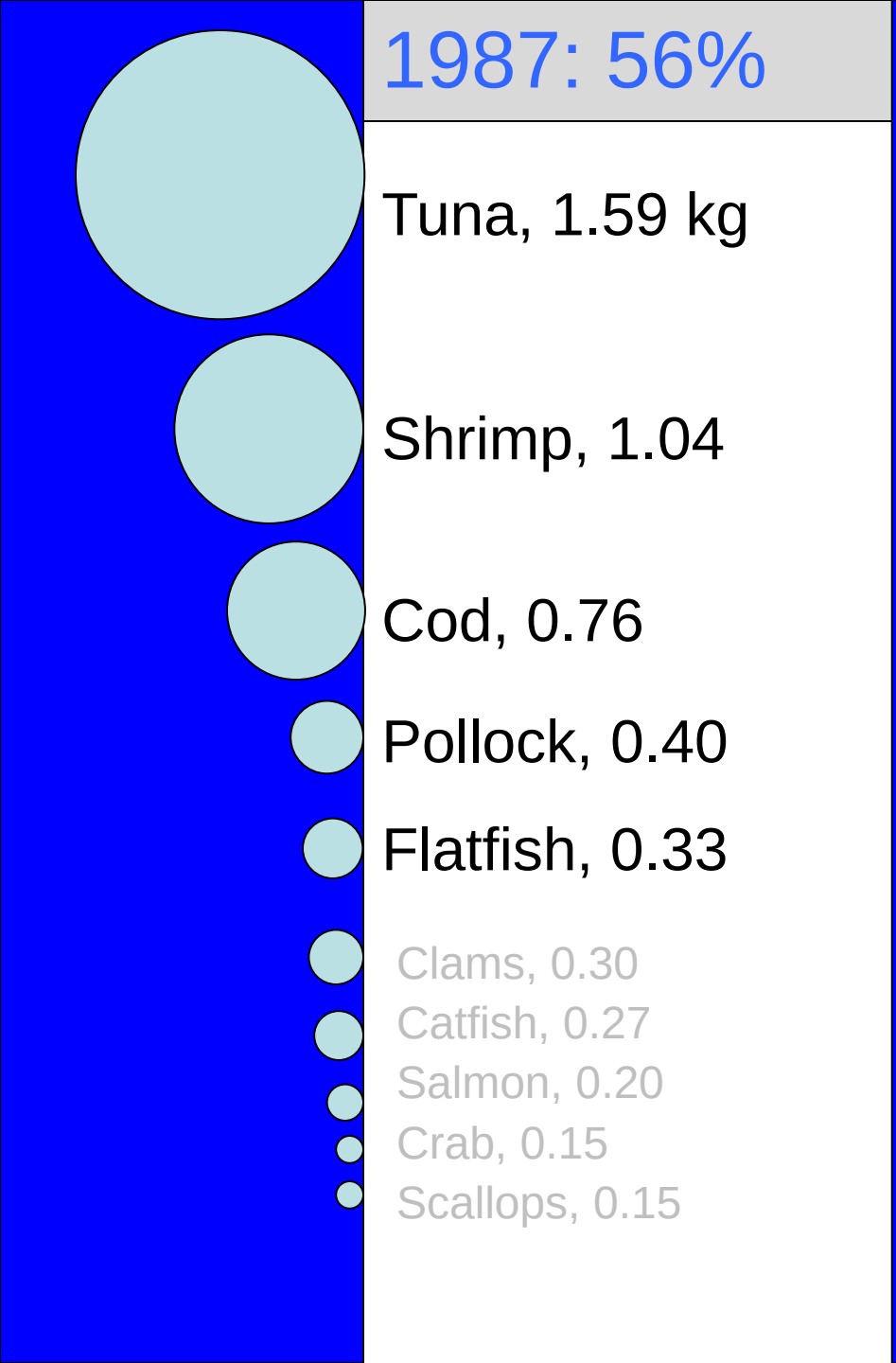
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Tuna, 1.59 kg
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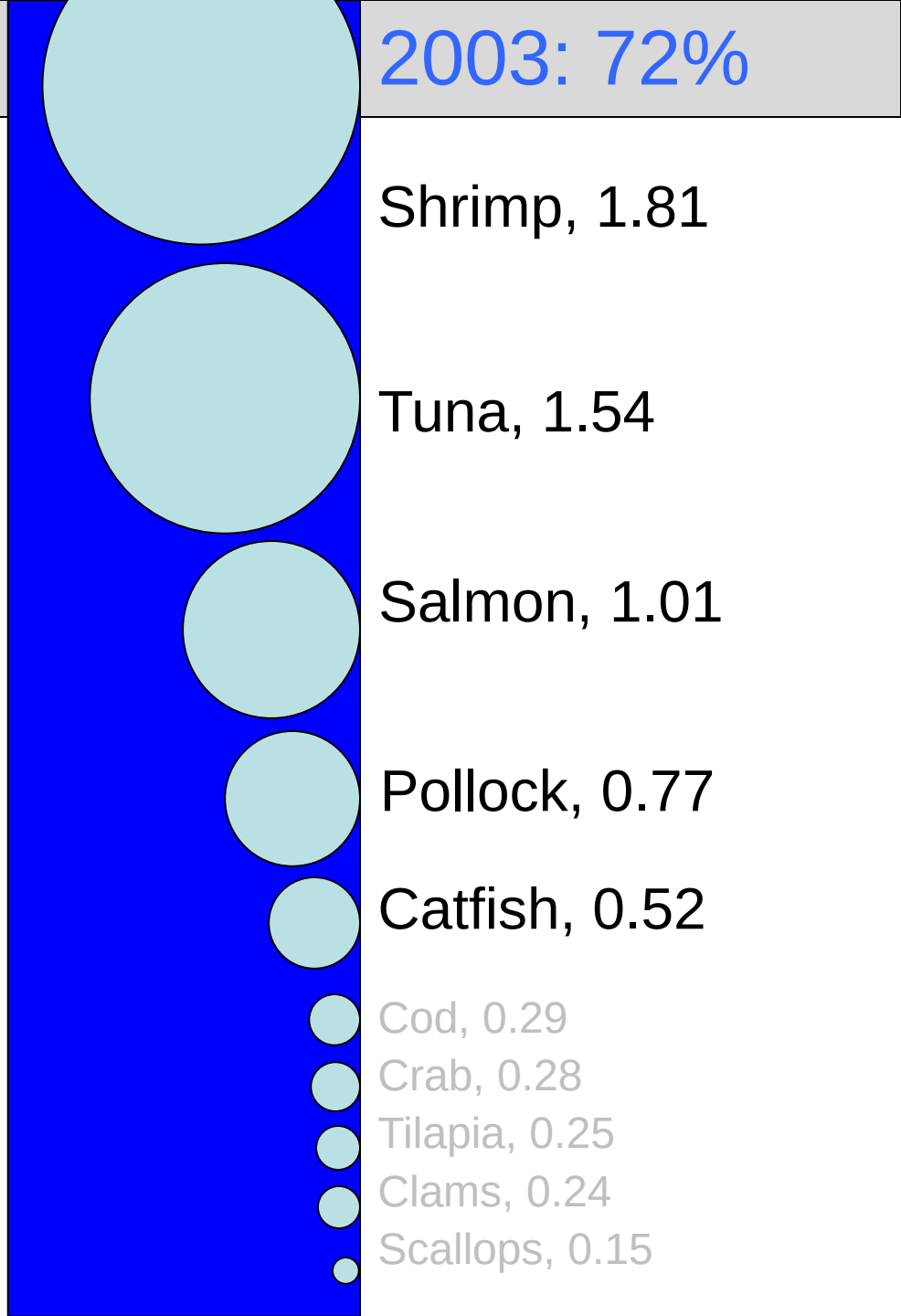
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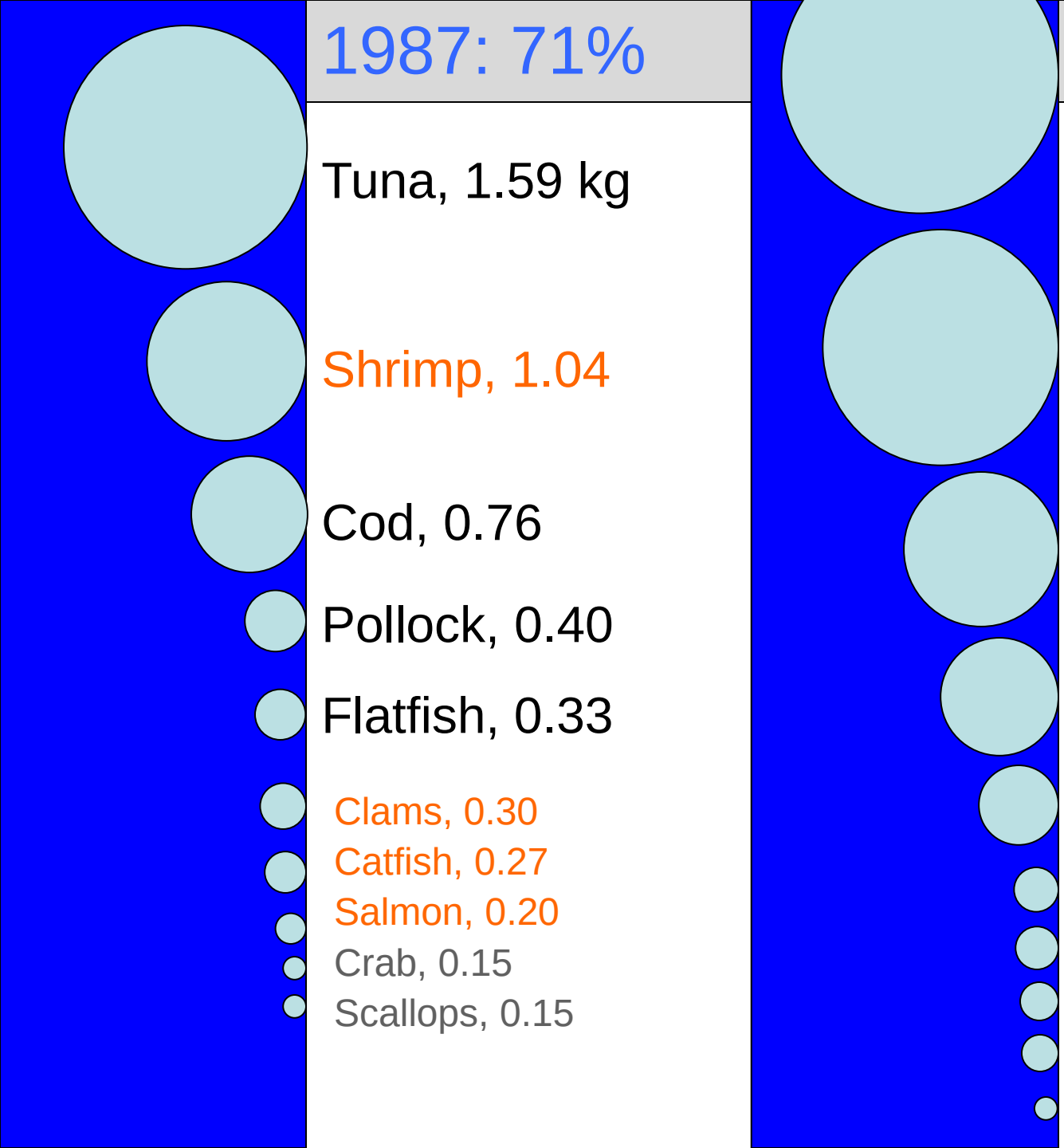
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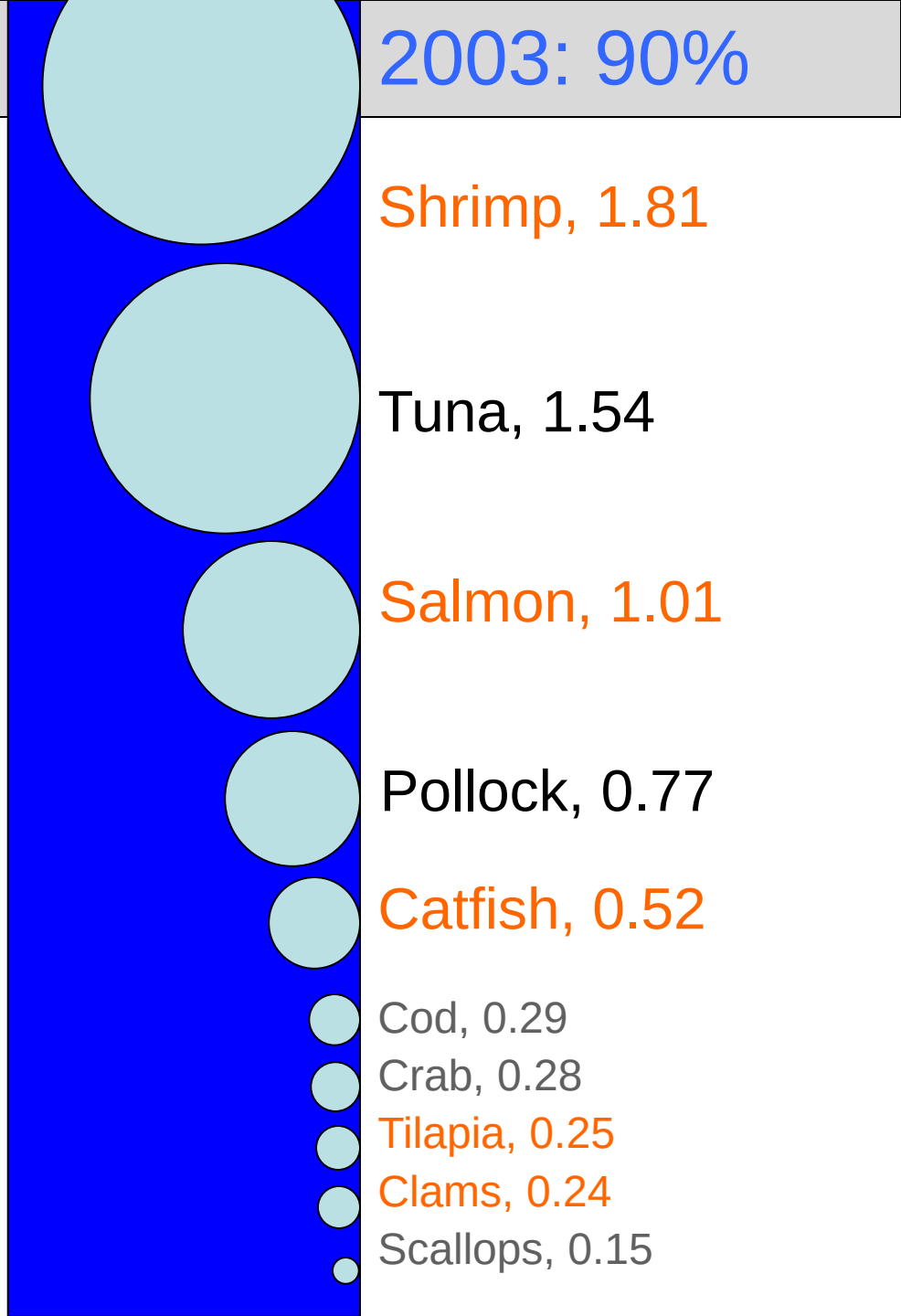
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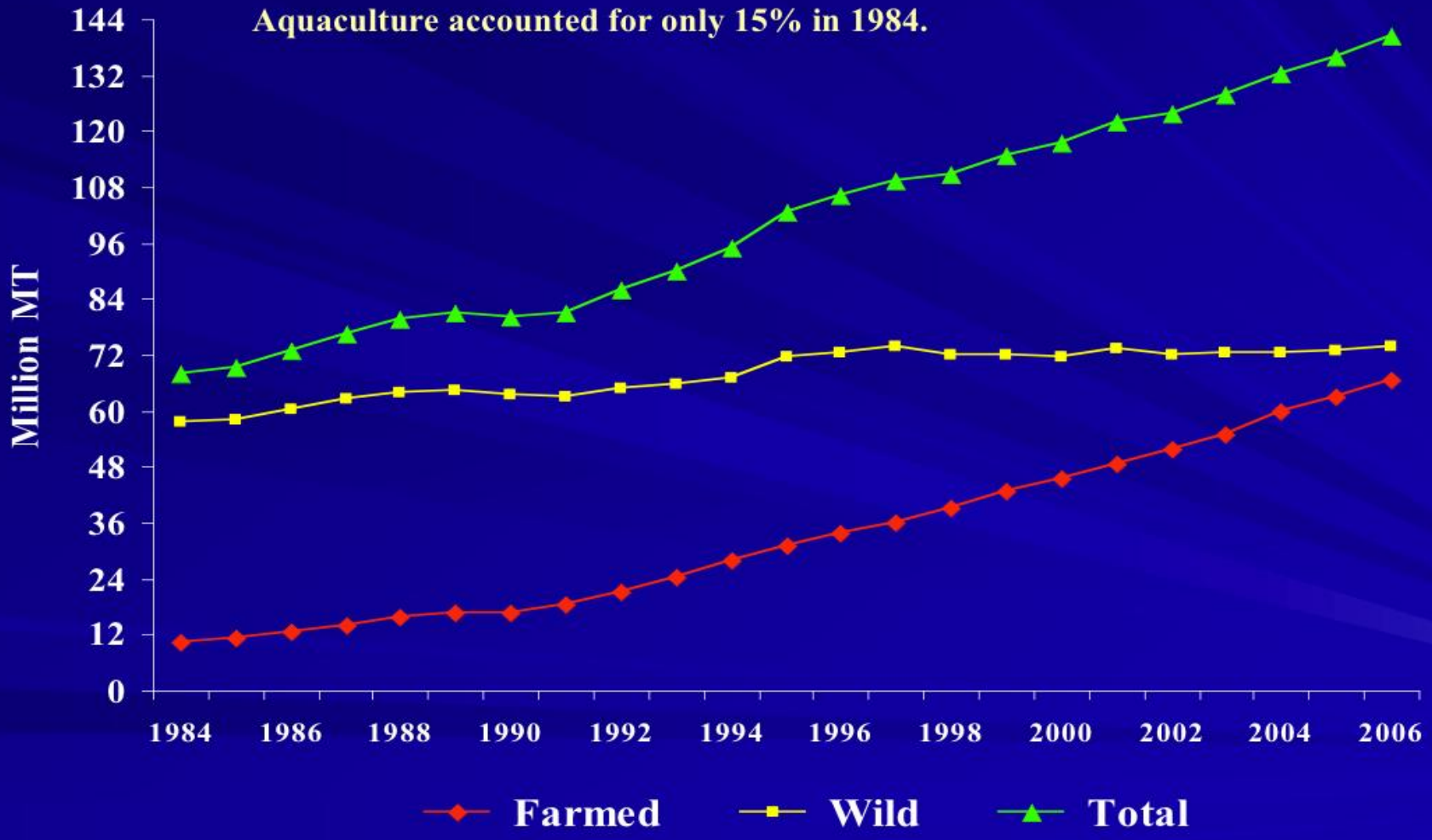
Approximate World Production of "Food" Fish and Seaweeds

Aquaculture accounted for 47% of world food fish production in 2006.

Aquaculture accounted for only 15% in 1984.



Source: FISHSTAT (2008).

What drives the market?

- Supply
- Quality
- Price Point

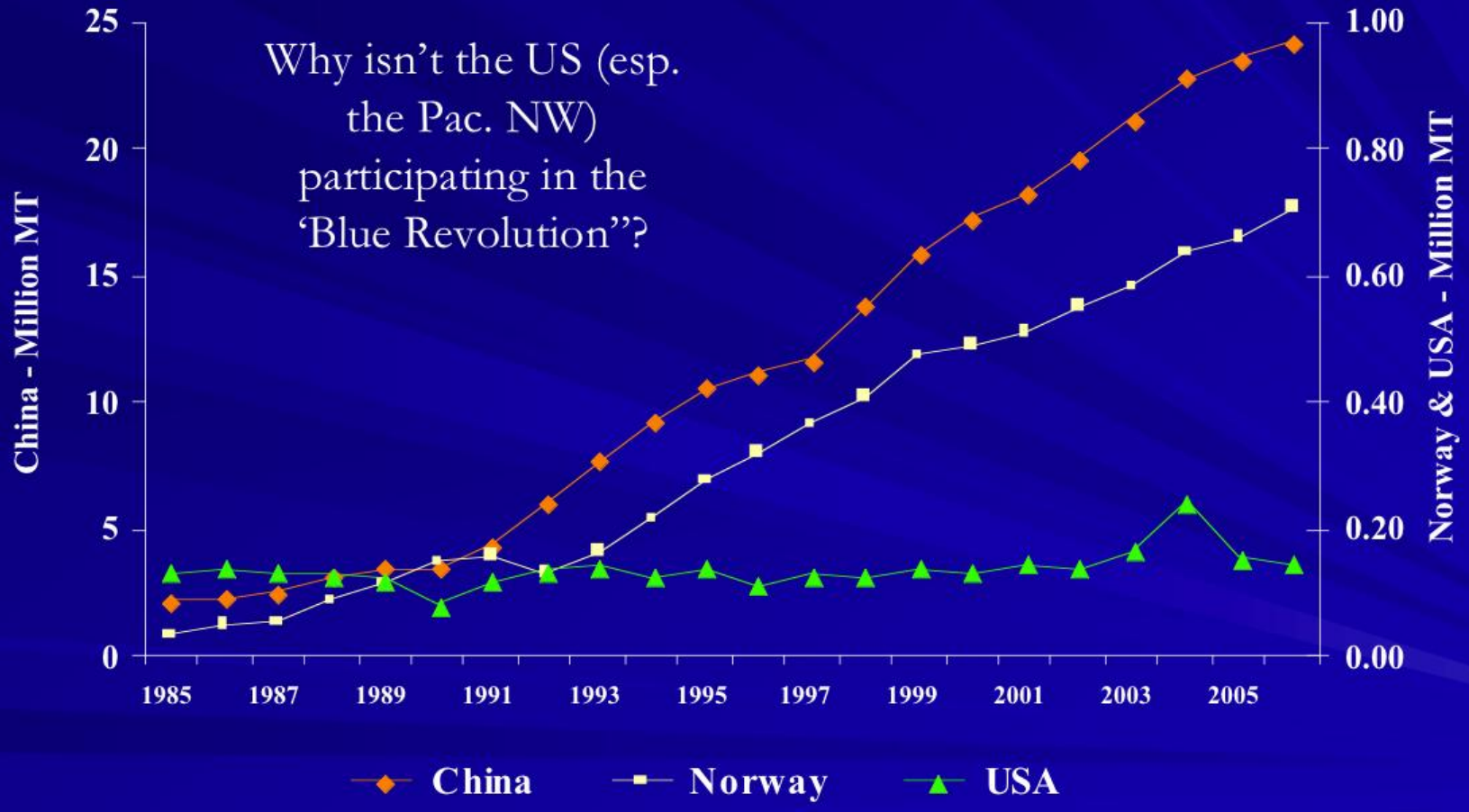
All favorable for Aquaculture
Also, note what's missing:
Management, Sustainability, Variety, Trade Restrictions

Production Costs
Aquaculture vs. Fisheries

Item	Aquaculture	Fishery
Labor	4 – 10%	**25 – 45%**
Maintenance	2 – 4%	**9 – 23%**
Fuel	1 – 4%	4 – 11%
Fingerlings	2 – **15%**	NA
Feed	**40 – 60%**	NA

Over 60% Reduction in Norwegian Farmed Salmon Production Costs in 20 years:

Marine/Coastal Aquaculture Production in China, Norway, and the U.S.



Source: FISHSTAT (2008).

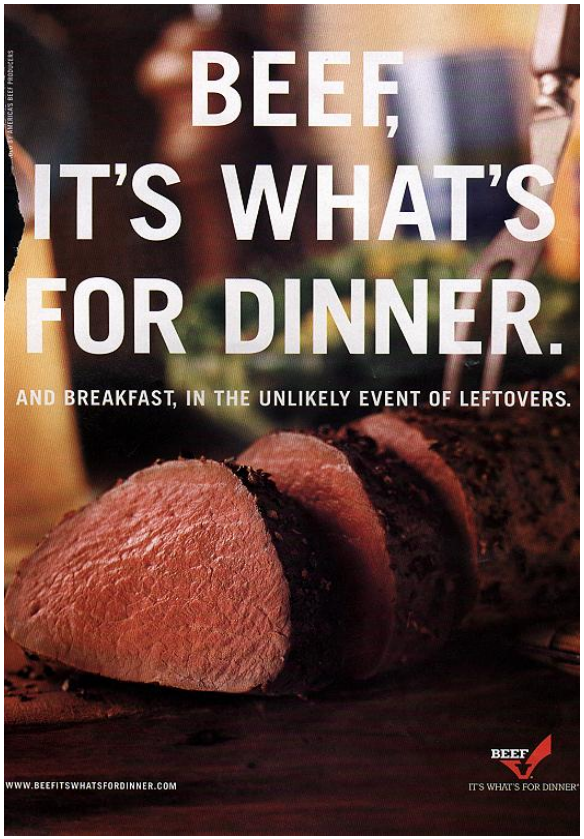
The Result of Not Paying Attention: US Seafood

- Seafood is the 2nd largest contributor to the trade deficit (after oil)
- >80% of the Seafood we consume imported.
- China is #1 global importer AND exporter

New Questions

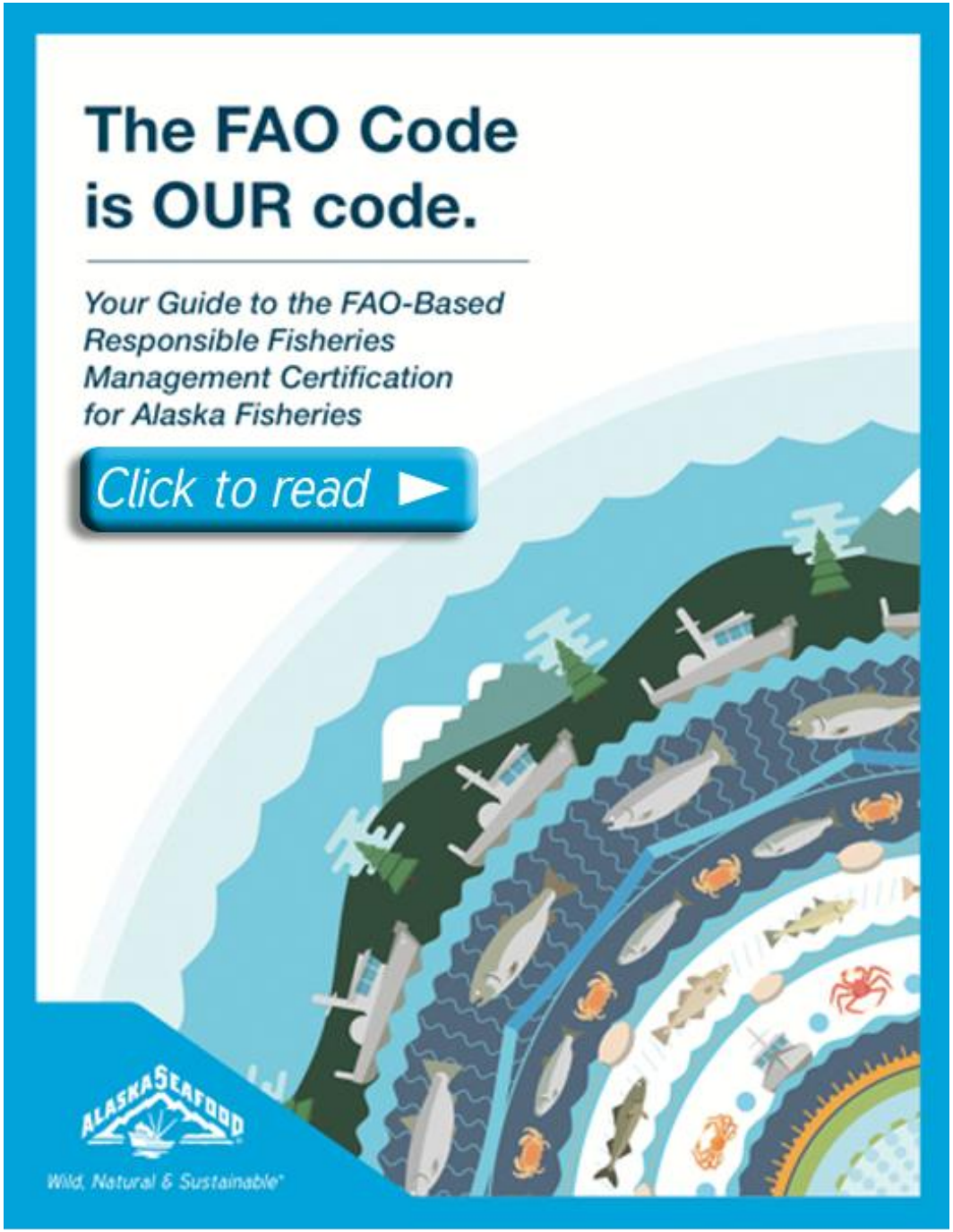
In order to use drive the market to sustainable seafood products:

- How to increase the ability for sustainable products to be competitive in the marketplace?
- How do you get consumers to purchase sustainable seafood products if they cost more?



Targeted Marketing Campaigns

- Industry aligned
- Consumer and food-service oriented
- Multiple levels of information



Alaska Seafood Marketing Institute

- Fragmented industry fends for itself.
- Significant marketing obstacles
- Environmental groups: not helping